

Previous Pensionable Public Service Questionnaire

Please complete this form using black ink and in BLOCK CAPITALS.

Please note this form is not for transferring into the Scheme - if you've benefits you wish to transfer in, please use our Transfer in form on the website.

The purpose of this form is to ensure that you are afforded the service and eligibility protections brought about by the Public Service Pensions and Judicial Offices Act 2022 (the Act¹). Under certain conditions the Act allows for a new member of a public service pension scheme, who has previous membership in another public service pension scheme, to be covered for the remedy in the Teachers' Pension Scheme.

There are two possible elements of protection each with their own eligibility criteria:

1. Salary Link protection (in respect of final salary service in a previous public service scheme on transfer into the Teachers' Pension Scheme) commencing before 1 April 2015 without a break in pensionable service of more than five years, and
 - Final salary service for the remedy period from 1 April 2015 to 31 March 2022; or
 - A career average underpin in the final salary scheme in respect of relevant remedy service for the period between 1 April 2015 and 31 March 2022.
2. Following the Act a member with eligible public service in in another scheme on 31 March 2012 or on a gap in service spanning 31 March 2012 not exceeding five years, will be given a choice of either:

For your previous pensionable public service to be recorded on your record please arrange for the previous public service pension administrator to complete the relevant sections of this form.

Section 1: Your public service pension history

To help us understand your previous public service pension history please complete the following:

1. **Have you had pensionable service in any another Public Service Pension Scheme, prior to joining the Teachers' Pension Scheme?** For example were you a civil servant, local government worker, in the NHS, fire and rescue worker, in the judiciary, or a member of the police or armed forces in the UK?
Yes ☐ No ☐
2. **Do you have a previous public service employment which was, or is now, part of a TUPE transfer arrangement?**
Yes ☐ No ☐

If you have answered 'No' to all of the above questions, you do not need to take any further action with this form.

If you have answered 'Yes' to one of the questions please continue.

In order for Teachers' Pensions to accurately record relevant previous pensionable service, we have provided the enclosed form for completion by yourself and your previous public service pension scheme administrator. If you have more than one previous public service scheme, this information must be certified by each of your previous public service pension providers.

Please complete Part A and B then pass the form to your employer who should then send it to us.

Teachers' Pensions
11b Lingfield Point
Darlington
DL1 1AX

(continued overleaf)

General Data Protection Regulation (GDPR). The Department for Education (DfE) will use any information you provide in connection with the Teachers' Pension Scheme to administer and operate the scheme and pay benefits under it. This may include passing details to third parties that are involved in the administration and operation of the scheme. The DfE may also use your data for administrative purposes in line with its data protection notification. In order to fulfil its duty to protect public money, the DfE may use information it holds to prevent and detect fraud. It may also share information with other organisations that handle public funds. If there is any difference between the legislation governing the Teachers' Pension Scheme and the information in this application form, the legislation will apply. For more information on how we will use your data, go to www.teacherspensions.co.uk/public/privacy.

Please return to us at:

Teachers' Pensions,
11b Lingfield Point,
Darlington, DL1 1AX

www.teacherspensions.co.uk

Part A: About you and your membership of the Teachers' Pension Scheme

Section 2: Personal details

1. Teacher's reference number (example 99/99999)

 /

2. Surname (one character per box)

3. Former surname (if any)

4. First name

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

5. Title (please tick, or state if other)

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

6. National Insurance number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

7. Name and address of your employer

Postcode

8. Start date of new role (DD/MM/YYYY)

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Part B: About your previous public service pension scheme membership

Please provide us with the details of the Public Service Pension Scheme to which you have previously been a member? If you had more than one employer while a member of that Scheme, please give details of the last relevant employer.

Section 3: Your previous Public Service Pension Scheme

1. Name of public service pension scheme

2. Last employer while a member of this scheme

3. Start date of scheme membership (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

4. End date of scheme membership (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

5. Pension Scheme Membership number (if known)

6. Have you received a refund for this period of service?

Yes ☐ No ☐

7. Do you hold a deferred benefit for this period of service?
(i.e. pension benefits that have not yet been taken)

Yes ☐ No ☐

8. Are you in receipt of a pension for this period of membership?

Yes ☐ No ☐

9. Have you transferred these benefits to another pension provider?

Yes ☐ No ☐

a) If 'yes' please provide name of pension scheme and provider to which the benefits have been transferred.

b) Was this transfer part of a 'TUPE' transfer?

Yes ☐ No ☐

Part B: About your previous public service pension scheme membership

Please provide us with the details of the Public Service Pension Scheme to which you have previously been a member? If you had more than one employer while a member of that Scheme, please give details of the last relevant employer.

Section 3: Your previous Public Service Pension Scheme

1. Name of public service pension scheme

2. Last employer while a member of this scheme

3. Start date of scheme membership (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

4. End date of scheme membership (DD/MM/YYYY)

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

5. Pension Scheme Membership number (if known)

6. Have you received a refund for this period of service?

Yes ☐ No ☐

7. Do you hold a deferred benefit for this period of service?
(i.e. pension benefits that have not yet been taken)

Yes ☐ No ☐

8. Are you in receipt of a pension for this period of membership?

Yes ☐ No ☐

9. Have you transferred these benefits to another pension provider?

Yes ☐ No ☐

a) If 'yes' please provide name of pension scheme and provider to which the benefits have been transferred.

b) Was this transfer part of a 'TUPE' transfer?

Yes ☐ No ☐

Please provide any further details

Part C: To be completed by previous public service pension scheme administrator. (continued)

Section 1: Certification from previous public service scheme

1. Name of public service pension scheme

2. Name of Administrator / Sub Scheme Administrator

3. Address of Administrator / Sub Scheme Administrator

Postcode

Section 2: Declaration

1. We confirm that the information completed in Part B is correct. Yes ☐ No ☐

If any information provided in Part B is incorrect, please provide the correct details below:

2. Dates of pensionable service:-

(Please provide start and end dates, with split service only where there is a gap in service of more than 5 years)

3. Was Salary Link protection still in place at date of leaving scheme? Yes ☐ No ☐

(This relates to members who had continuous public service in the final salary and career average schemes commencing before 1 April 2015 without a break in pensionable service of more than five years)

4. We confirm that on 31 March 2012, the individual was a member of our public service pension scheme, or is eligible for the remedy in respect of Transitional Protection under the Public Service Pensions and Judicial Offices Act 2022.

Yes ☐ No ☐

(continued overleaf)

General Data Protection Regulation (GDPR). The Department for Education (DfE) will use any information you provide in connection with the Teachers' Pension Scheme to administer and operate the scheme and pay benefits under it. This may include passing details to third parties that are involved in the administration and operation of the scheme. The DfE may also use your data for administrative purposes in line with its data protection notification. In order to fulfil its duty to protect public money, the DfE may use information it holds to prevent and detect fraud. It may also share information with other organisations that handle public funds. If there is any difference between the legislation governing the Teachers' Pension Scheme and the information in this application form, the legislation will apply. For more information on how we will use your data, go to www.teacherspensions.co.uk/public/privacy.

Please return to us at:

Teachers' Pensions,
11b Lingfield Point,
Darlington, DL1 1AX

www.teacherspensions.co.uk

We certify that the information provided in this form is correct and may be used to determine if the member noted in Part A is eligible for any protections under the Public Service Pensions and Judicial Offices Act 2022 and the final salary link under Schedule of the Public Services Pensions Act 2013.

Signature

Date (DD/MM/YYYY)

1. Name of Official (in capital letters)

2. Role of Official (in capital letters)

3. Telephone number (inc. STD code and extn.)

4. Email address

5. Contact address

Postcode

General Data Protection Regulation (GDPR). The Department for Education (DfE) will use any information you provide in connection with the Teachers' Pension Scheme to administer and operate the scheme and pay benefits under it. This may include passing details to third parties that are involved in the administration and operation of the scheme. The DfE may also use your data for administrative purposes in line with its data protection notification. In order to fulfil its duty to protect public money, the DfE may use information it holds to prevent and detect fraud. It may also share information with other organisations that handle public funds. If there is any difference between the legislation governing the Teachers' Pension Scheme and the information in this application form, the legislation will apply. For more information on how we will use your data, go to www.teacherspensions.co.uk/public/privacy.

Please return to us at:

Teachers' Pensions,
11b Lingfield Point,
Darlington, DL1 1AX

www.teacherspensions.co.uk

Notes

- Under the provisions of the Public Service Pensions and Judicial Office Act 2022 a person who has pensionable public service in another scheme is eligible for the transitional protection remedy regardless of whether they transfer in to the Teachers' Pension Scheme or not.
- In some schemes protection was afforded to members who were in eligible employment on 31 March 2012 as well as the scheme closing date, or did not have a relevant break exceeding five years, spanning these dates.
- The information provided on this form will assist Teachers' Pensions in identifying whether a person is subject to the remedy, even where a member has transferred from a previous public service scheme.
- Members covered for protection under the Transitional Protection remedy may be entitled to a final salary link. A member who transfers in from another public service scheme will be entitled to have previous final salary service linked to their of the Public Service 7 current earnings in the Teachers' Pensions career average scheme. This is on account of Schedule 2013 Pensions Act.

General Data Protection Regulation (GDPR). The Department for Education (DfE) will use any information you provide in connection with the Teachers' Pension Scheme to administer and operate the scheme and pay benefits under it. This may include passing details to third parties that are involved in the administration and operation of the scheme. The DfE may also use your data for administrative purposes in line with its data protection notification. In order to fulfil its duty to protect public money, the DfE may use information it holds to prevent and detect fraud. It may also share information with other organisations that handle public funds. If there is any difference between the legislation governing the Teachers' Pension Scheme and the information in this application form, the legislation will apply. For more information on how we will use your data, go to www.teacherspensions.co.uk/public/privacy.

Please return to us at:

Teachers' Pensions,
11b Lingfield Point,
Darlington, DL1 1AX

www.teacherspensions.co.uk